This document is intended to be used by Grant Managers and other Effort Coordinators who work directly with certifiers to provide them with system views that they encounter through the certification process. It assumes familiarity with the basic processes for effort reporting at the University. The following topics are covered in this job aid:

- Certifier Homepage
- Navigation to Statements
- Statement Views
- Certification Screens
- Multiple Statements
- Email Notifications
- Login Issues

*Documentation on other processes can be found on the effort reporting support page on the OSP website.

**Certifier Homepage**

The view a certifier encounters when they log into the system is somewhat different from what effort coordinators see and the work list content is displayed under a single “Certifier To-Do List”. Below is a screen shot of the homepage along with descriptions and navigation of what is displayed:
1.) The Effort Statement section displays all individual annual statements that are in need of certification or are building as part of the current period of performance. Clicking on the status link opens the statement.

2.) The Quarterly Project Effort Certifications section displays all quarterly project statements owned by the certifier that are in need of certification or are building as part of the current period of performance. This includes statements where the individual is the PI (based on the root of the account) or is the designee of the statement. Clicking on the icon in the staff icon displays a list of the individuals whose effort appears on the statement. The status descriptor next to each statement is a link that opens the statement.

3.) The Collaborators Quarterly Personnel Part-Of Accounts section displays a list of all quarterly project statements in need of certification or are building as part of the current period of performance for statements where the individual is listed as the project PI, but the account belongs to another individual’s root. Clicking on the status link for each opens the statement. These are listed to provide PI’s with certification information on their collaborators statements but are view-only as certification is completed by the account statement owner.

Navigation to Statements

In addition to the links on the homepage through the “Certifier To-Do List”, certifiers can also access their statements during certification through the “Certify” menu where they can select either their annual statements through the “My Effort Statements” option or quarterly statements through the “My Project Statements”.

![Navigation to Statements Image]
Statement Views

Statement view for certifiers are similar to what an effort coordinator would see and examples of both statement type views are displayed below:

Quarterly Project Statement:
### Annual Statement:

<table>
<thead>
<tr>
<th>Account Details</th>
<th>Salary</th>
<th>Cost Share</th>
<th>Computed Effort</th>
<th>Certified Effort</th>
<th>Certify?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsored</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>102311 Studies on being a Scientist</td>
<td>25%</td>
<td>0%</td>
<td>25%</td>
<td>25%</td>
<td>✔️</td>
</tr>
<tr>
<td>100511-6500014-001 Main 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Award Total:</td>
<td>25%</td>
<td>0%</td>
<td>25%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>100512 Training Program in Financial Management</td>
<td>25%</td>
<td>0%</td>
<td>25%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>100512-650002-0001 Year 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Award Total:</td>
<td>25%</td>
<td>0%</td>
<td>25%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>Sponsored Total:</td>
<td>50%</td>
<td>0%</td>
<td>50%</td>
<td>50%</td>
<td></td>
</tr>
<tr>
<td>Non Sponsored</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>000000-000000-0000 Non Sponsored</td>
<td>50%</td>
<td>0%</td>
<td>50%</td>
<td>50%</td>
<td></td>
</tr>
<tr>
<td>Non Sponsored Total:</td>
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<td>0%</td>
<td>50%</td>
<td>50%</td>
<td></td>
</tr>
<tr>
<td>Grand Total:</td>
<td>100%</td>
<td>0%</td>
<td>100%</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

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Last updated: 7/8/2017 - JKD
If a certifier is set up as a proxy for another annual certifier, that individual will be listed in the work list and on the statement it will be noted in the info box on the middle of the screen:

Similarly, if the certifier is a designee on a project statement that can also be identified in the work list and statement info section:

*Please note that in both cases, the original certifier can still access the statement.*
When a statement is placed “On-Hold” it will be indicated by a warning in the statement info box along with the user who placed the hold. Additionally it will be noted in red text on the right corner of the statement:

*Statements that are on hold will still appear on the homepage work list and will still be view accessible to certifiers through the certify menu.*  

Another critical statement indicator, occurs when there is no primary effort coordinator (PEC) assigned to the owning department of the statement. This will also appears as a warning in the info box on the statement:

If this is encountered, a certifier cannot complete certification and the help desk (ecrt@harvard.edu) should be notified ASAP.

**Steps to Certification**

When certifiers access their statements they should review the lines and ensure that the effort that has populated is accurate as well as any notes or attachments that have been added. Any questions about the accuracy should be directed to the Grant Manager. Once a statement has been fully reviewed and is ready to certify, the following steps are required to complete the process:

1.) Select each line on the statement to certify by clicking each check box in the certify column:
Or checking all lines with a single selection by clicking on the certify icon on project statements:

*Please note that all lines must be selected in order to proceed with certification*

2.A.) Select the certify button to process and launch the attestation screen:

2.B.) If the statement contains a large volume of data there may be an additional pop-up that will appear warning a user to not close their browser while the statement processes. The certifier should select “OK” on this screen to begin the processing and launch the attestation screen:

*If the browser window is closed at this time, the statement certification will not be recorded*
3.) Read the attestation screen contents and select "I agree" to process certification:

Viewing Multiple Statements

To help make the process more efficient and to reduce some of the administrative burden of clicking back and forth to access statements, ecrt contains a feature that enables a user to view and certify all statements within the same type (project or annual) on a single scrollable screen. This is especially helpful for certifiers with a high statement volume.

To activate this view the “Select-all certified” icon from the Work List of any single statement should be selected:
This highlights all the statements in the work list and creates a window that displays all of the statements on a single scrolling page. As statements are certified, the completed statements will drop off the list.
Email Notifications

To assist with the facilitation and communication of the certification process, there are several automated email notifications that get sent to a certifier from the system as certain deadlines approach or system actions occur. These emails are sent from ecrt@harvard.edu and replies to them will generate a ticket with the ecrt helpdesk.

Below is a list of each along with notes explaining what prompts each:

<table>
<thead>
<tr>
<th>Email</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certification Period Opening Email</td>
<td>This is intended to communicate that the certification period has opened and is sent out mid-morning on the period open date to all responsible certifiers.</td>
</tr>
<tr>
<td>Reminder Email #1</td>
<td>This is intended to communicate that certification is still open and that there are outstanding statements. It is currently set to generate 14 days before the deadline. Only individuals who have outstanding statements will be notified.</td>
</tr>
<tr>
<td>Reminder Email #2</td>
<td>This is intended to communicate that certification is still open and that there are outstanding statements. It is currently set to generate 7 days before the deadline. Only individuals who have outstanding statements will be notified.</td>
</tr>
<tr>
<td>Final Reminder Email</td>
<td>This is intended to communicate that certification is still open and that there are outstanding statements. It is currently set to generate 1 day before the deadline. Only individuals who have outstanding statements will be notified.</td>
</tr>
<tr>
<td>Certification Reopened Email Notification</td>
<td>This is generated when a statement is re-opened by an Effort Coordinator processing a payroll task or when a statement is manually reopened. It is intended to communicate that the statement has been reopened and needs to be recertified. The date of this notification begins the 21 day period by which recertification must be completed under university policy.</td>
</tr>
<tr>
<td>Certify Start Email for Statements on Hold</td>
<td>This sends out the certification period open email and is generated when a statement is taken off hold. This will only generate when the hold was placed prior to the certification start date.</td>
</tr>
</tbody>
</table>

*Please note the original certifiers will not receive notifications if there is a proxy or designee set-up*
Login Trouble Shooting

Because certifiers access the system with less frequency than other users, occasionally they encounter issues when attempting to login to the system. Below are some tips for preventing some known issues along with tips for offering assistance to your certifiers if they run into them.

If a user encounters the following screen it is most likely because an incomplete url was entered or an inaccurate bookmark was used:

![https://ecrt.harvard.edu](https://ecrt.harvard.edu)

It works!

The full url for the ecrt system is [http://ecrt.harvard.edu/ecrt/](http://ecrt.harvard.edu/ecrt/). Typing this into a browser window should take you to the site. The system can also be accessed through the links in the automated emails as well as through links on the OSP or ATS websites.

Also, while ecrt is an external product, it is secured through Harvard Key and always requires key authentication for access. When accessing the system a user should always encounter the Harvard Key (below left) screen when providing credentials. However, due to web caching or other browser settings, sometimes a user will encounter the vendor login screen that contains ecrt welcome text and asks for a username or password (below right). This is not set-up for use by Harvard employees and should not be used to access the system as a user will receive an error messages when attempting.

If the vendor screen is encountered (above right) when attempting to access the system, clearing browser cache and reaccessing the system through the correct url should prevent this from reappearing.

Finally, for certifiers who are accessing the system overseas or elsewhere, where they do not have a reliable internet signal or data activated on their mobile device used for two-step verification, the Duo app can still be used to generate a six digit passcode without a connection. Instructions can be found on the following HUIT Quick guide: [https://huit.harvard.edu/files/huit/files/using_two-step_verification.pdf](https://huit.harvard.edu/files/huit/files/using_two-step_verification.pdf)